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ABSTRACT

This protocol is designed to help plan and carry out meetings between persons with disabilities and those who are responsible for assisting them in making choices about their future services. It was developed to quantify and define some of the issues involved in having Illinois individuals who are eligible for relocation from nursing facilities participate in decisions regarding future services. The protocol guides the process involved in reviewing with the individual the content, structure, and setting of the services for which he or she is eligible, and helping him or her explore which of these options would best achieve the desired lifestyle. The protocol is also designed to attain some measure of consistency throughout the choice process among different populations, geographic areas, and nursing facilities. The protocol cites a question (such as "What type of information will the pre-admission screening agent share with the person?" "Who will participate in development of the initial service plan? and "What will be done if the person and his legal guardian want different service options?") and then offers one or more feasible options as a response to the question. The final section of the protocol contains questions which the pre-admission screening agent can ask the person to explore desired lifestyles and identify potential services. This section covers future planning for the person's home (such as the importance of helping to choose furniture and having people come over to visit), the community (such as the importance of being close to public transportation or being near family); and recreational and leisure time activities. (JDD)

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CHOICE PROTOCOL

A document to help plan and carry out meetings between persons with disabilities and those who are responsible for assisting them in making choices about their future services.

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EC 301237

Developed Through the Choice & Integration Project

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Funded Through a Grant From the
Illinois Planning Council on Developmental Disabilities

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This Choice Protocol is meant to supplement related efforts by the Illinois Department of Mental Health and Developmental Disabilities, which address the same subject. It is not intended that this document replace the procedure required by the Illinois Department of Mental Health and Developmental Disabilities.

The contents of this product were developed under a grant from the Illinois Planning Council on Developmental Disabilities. However, these contents do not necessarily reflect the policy of that agency.

In accordance with the Illinois Alternate Disposition Plan submitted in response to the Omnibus Budget Reconciliation Act of 1987, Illinois must ensure that individuals eligible for relocation from nursing facilities participate in decisions regarding future services. To address this requirement, the Department of Mental Health and Developmental Disabilities (DMHDD) has assigned Pre-Admission Screening (PAS) agencies responsibility for developing a process which will " identify the operational relationships among key participants in this phase of OBRA activity.". This protocol is one approach to quantifying and defining some of the issues related to this aim.

The issues addressed within this protocol relate to the circumstances under which persons with developmental disabilities and/or mental illness will be met with to discuss the service options available to them. The primary goal of this meeting is to review with the person the content, structure and setting of the services for which they are eligible, as well as help them explore which of these options would best allow them to achieve the type of lifestyle they desire.

A second goal of this protocol is to attain some measure of consistency throughout what is being called the "choice process". This is one way to ensure the equitable implementation of OBRA legislation among populations of persons with disabilities, geographic areas and nursing facilities. Further, adherence to a protocol will enable all concerned parties to be aware of how meetings with persons with disabilities will be conducted, what their role will be and what types of information will be discussed.

The protocol is designed to be easily understood and applied. Following each issue is one or more responses. Some responses are ranked and the highest ranked feasible action should be taken; other responses are applicable to specific circumstances; and still others are steps where more than one action or task must be completed. The following definitions should further assist in understanding and applying this protocol:

facility - nursing facility where the person currently resides

guardian - a person who is the legal, court-appointed guardian of another

meeting - meeting where the person is presented with information on service options and helped to explore their expectations from each

person - the person with a disability whom the choice process is directed toward

agency - an agency licensed to provide services for which the person is eligible

The final section of this Protocol contains questions which the PAS agent can ask the person to help them explore the kind of lifestyle which he/she would like to have. This section can be completed before the full meeting occurs, or at the beginning of the meeting. The person's response to these questions should be used in helping them to identify the types of services which they wish to explore. This is not a formal assessment, but rather a tool to assist the person in exploring their feelings and expectations regarding their future.

PROTOCOL FOR OFFERING SERVICE OPTIONS TO PERSONS WITH DISABILITIES

1. How will the person be informed of the meeting?

   - The PAS agent will forward the person/guardian a letter; **and**
   - The PAS agent will forward a letter to the administrator at the facility informing him/her that a meeting has been arranged between the person and the PAS agent and indicate whether the person has requested that anyone from the facility be present at the meeting.

2. Where will the meeting take place?

   - At the PAS agency's office; **or**
   - At the nursing facility; **or**
   - In the guardian's home; **or**
   - At another available location which the person chooses.

3. Who will arrange and facilitate the meeting?

   - The PAS agent

4. Who will select the others to be present at the meeting?

   - The person will select others to be invited; **or**
   - The person's guardian will select others to be invited; **and**
   - The PAS agent will suggest others whom the person or their guardian may want to invite

5. How will others be informed of the meeting?

   - The PAS agent will forward all invited parties a letter informing them of the meeting; **and**
   - The PAS agent will provide his/her telephone number and offer to discuss the purpose of the meeting further

6. What role do those at the meeting have?

   - The role of all those in attendance is to provide information on the service options available to the person (note: some persons in attendance may not be service representatives or may represent services for which the person is not eligible)

7. What type of information will the PAS agent share with the person?

- Assessment results from the PAS/ARR process; **and**
- Information about potential service options; **and**
- Lifestyle opportunities available through different service options; **and**
- The person's right to receive additional information and materials and to visit other potential service providers

8. What information will others in attendance be allowed to share with the person?

- Assessment results; **and**
- Information about potential service options; **and**
- Lifestyle opportunities available through different service options; **and**
- The person's right to receive additional information and materials and to visit other potential service providers

9. Will the PAS agent or other professionals make service recommendations?

- Recommendations regarding the types and levels of support needed by a person may be made, but no recommendations regarding where the support should be provided would be made

10. Will the person be allowed to ask those participating in the meeting questions ?

- The person will be allowed and encouraged to ask questions of all those participating in the meeting

11. How long will the meeting last?

- Meetings may take as long as necessary for the person/guardian to understand the materials and information presented

12. How will future meetings with the person be scheduled?

- After the meeting the person may request the PAS agent arrange site visits to various service options; **or**
- After the meeting, the person may choose to remain in their present situation and will be visited by the PAS agent in 12 months; **or**
- After the meeting, the person will be told he/she can contact the PAS agent at any time to schedule another meeting. Meetings will be scheduled within one month of such requests

13. What accommodations will be made for persons who do not speak English or speak verbally?

- Persons may use whatever communication device they normally use; **and**
- Someone who understands the person's communication/language will be asked to attend the meeting and translate; **and**
- The PAS agency will make available basic communication equipment and/or translators to those able to use them

14. What will be done if the person and their legal guardian want different service options?

- The guardian's decision will supercede the person's; **and**
- The PAS agent will ask the guardian to visit and explore different service options before making a binding decision

15. Will persons who do not have guardians be allowed to make their own decisions regarding future service options?

- Persons who have been reviewed by PAS and do not have a court-appointed guardian have the right to make their own decisions regarding future service options

16. How will disputed assessment results be addressed?

- The results of assessments conducted under federal OBRA requirements will take precedence over other assessment results

17. Can a person choose to receive one type of service from an agency without being required to participate in other agency programming (e.g. receive residential supports and not participate in a workshop)?

- Each agency will establish it's own policy in this area which they will share with the person during site visits; **and**
- The PAS agent will inform persons of the services which agencies provide

18. When will an initial service plan be developed for the person?

- An initial service plan will be developed during discharge staffing meetings for persons moving from nursing facilities into other service programs; **or**
- A meeting will be arranged to develop an initial service plan for persons moving from their family home into a service program

19. Who will participate in the development of this plan?

- The person who will be receiving services; **and**
- The PAS agent; **and**

- Staff of the future service provider (s); **and**
- Staff of the current service provider (s); **and**
- The guardian; **and**
- All others requested by the person or their guardian

20. How many agencies will the person visit?

- The person may request to visit up to three available agency programs, or available programs in three areas; **then**
- The person may request to visit additional agency programs one at a time until they find one which meets their needs

21. Who will accompany the person on these visits?

- The PAS agent will accompany the person on the visits; **and**
- A representative from the agency whose program is being visited may accompany the person; **and**
- potential house mates; **and**
- Others whom the person requests may accompany him/her

22. When will site visits take place?

- Site visits will take place as soon after the choice meeting as possible; **and**
- Site visits will be arranged to accommodate the schedules of the person visiting as well as the agency being visited; **and**
- Site visits may occur during evening and week-end hours so the person may meet others in the program and observe activities

23. Who is responsible for coordinating site visits?

- The PAS agent will coordinate site visits; **and**
- The PAS agent will notify staff of the agency being visited; **and**

24. When can the person/guardian make a decision regarding moving?

- The person may decide they want to move upon visiting the available site(s); **or**
- The person may telephone the PAS agent with their decision after visiting a site(s); **or**

- The person may contact the PAS agent at any time upon visiting a site(s) and inform him/her of their decision

25. Will the person's decision be final?

- Persons choosing to remain in their current residential setting will be monitored in accordance with PASARR requirements and will be given the opportunity to again consider moving in the future; **and**

- Persons choosing to move into a new service program would be able to rescind their decision, though if they are no longer eligible for their current placement, an alternative would have to be explored. Once person's indicate a desire to move, he/she would begin working with the agency to plan the move.

26. If the person chooses to remain in their current setting, how will additional, necessary services for which they are eligible be coordinated?

- The PAS agent will share information regarding service recommendations with staff of the facility, and will provide the facility with a copy of these recommendations; **and**

- Appropriate state code agencies will be responsible for ensuring that additional services are appropriately provided

27. How will the person's capacity to make decisions be determined?

- All persons who have not been adjudicated will be assumed capable of making their own decisions; **or**

- For those people who have a guardian, he/she will make decisions on behalf of the person; **and**

- The PAS agent will ensure that a person's inability to communicate verbally does not impede their right to make decisions on their own behalf; **and**

- The PAS agent will attempt to involve all persons in the choice-making process, and the preference of all persons will be solicited

Name: _____

Date: _____

Facility: _____

FUTURE PLANNING FOR YOUR HOME ...

where would you like to live: _____

how many people would you like to share your home;_____ your bedroom _____

do you have a friend (s) whom you would like to live with: yes___ no___

what is his/her name: _____

where does he/she live: _____

is there anything special you would like in your home that we should know about:

_____

_____

_____

What things would be important for you in order to be happy in your home:

	Very Important	Kind of Important	Not Too Important
1. I can help pick out my home			
2. I can help pick out the furniture			
3. I can help decorate			
4. I can choose my bedroom			
5. I can help set up the rules for my home			
6. I can help decide what chores will be done and when			
7. Staff won't clean my bedroom without asking me first			
8. I can help decide what we will eat			
9. I can help cook			
10. I can have a snack without having to ask permission			
11. I can invite people over to my home to visit me			
12. I can have a guest stay overnight in my home			
13. My family can come to my home			
14. People can call me at my home			
15. I can make private telephone calls			

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		Very Important	Kind of Important	Not Too Important
16.	I can open my own mail			
17.	I can meet the people who want to work in my home before they are hired			
18.	Someone will ask me what I think of the staff people before they are hired			
19.	I can tell the staff how I want them to help me			
20.	The staff supervisors will ask me if I think the staff are doing a good job			
21.	The staff people will be friendly			
22.	The staff cannot invite people over to my home without asking me			

FUTURE PLANNING FOR YOUR COMMUNITY ...

What things would be important for you about your neighborhood

		Very Important	Kind of Important	Not Too Important
1.	My home is close to a job that I would like to have			
2.	I can live close enough to my day program so that I don't have to switch agencies			
3.	I can live in the same town I am living in now			
4.	I can move to a different town			
5.	I can visit the town I will be moving to before I decide where I will live			
6.	My home is close to my family			
7.	My home is close to public transportation			
8.	My home is close to a shopping mall			
9.	My home is close to a restaurant that I like			
10.	I can live in a big apartment building where other people live			
11.	I can live in a house			
12.	My home can be near my friends (who, where:_____)			

This is a list of places where people go to do things or get things done in their neighborhood. Are you interested in going to any of these places or learning more about them? (circle response)

Laundromat	yes___	no___	Grocery store	yes___	no___
Barber shop	yes___	no___	Shopping mall	yes___	no___
Beauty parlor	yes___	no___	Bus stop	yes___	no___
Doctor's office	yes___	no___	Movie theater	yes___	no___
Library	yes___	no___	Pharmacy	yes___	no___
Park	yes___	no___	Restaurant	yes___	no___
Health club	yes___	no___	Dentist office	yes___	no___
Church	yes___	no___	Bank	yes___	no___

This is a list of some things people do for fun. Are you interested in going to any of these places or learning more about them? (circle response)

Go to sporting events	yes___	no___	Go for walks	yes___	no___
Watch sports on tv	yes___	no___	Go swimming	yes___	no___
Read books	yes___	no___	Go shopping	yes___	no___
Play sports	yes___	no___	Go to plays	yes___	no___
Watch television	yes___	no___	Go to concerts	yes___	no___
Listen to the radio	yes___	no___	Attend art fairs	yes___	no___
Go to the movies	yes___	no___	Visit friends	yes___	no___
Watch videos	yes___	no___	Volunteer	yes___	no___
Attend YMCA/YWCA	yes___	no___	Go to the library	yes___	no___

What You Want for the Future ...

1. What are two things you cannot do for yourself now, but would like to learn:

   1.

   2.

2. Where are two places you cannot go now, but would like to be able to go:

   1.

   2.

3. What do you like most about where you live now:

4. What are two things you would change about where you live now if you could:

   1.

   2.

5. What scares you the most about living in your own home:

6. What would be the most important thing to you about living in your own home: